PRESENTED BY UCLA'S DIRECTOR OF PROGRAM MANAGEMENT

FUNDAMENTALS OF PROJECT MANAGEMENT IN HEALTH CARE

MIKE ROACH

TODAY'S SERIES COVERS

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14. Initiate, Plan, Execute, Monitor, Close + Hypothetical Project

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16. When Projects Flourish, Patients Benefit

17. Empower Your Informatics Journey

FUNDAMENTALS OF PROJECT MANAGEMENT

IN HEALTHCARE

Mike Roach’s professional journey began in concert halls as a touring violinist. The demanding life of a musician, with its constant travels eventually led Mike to seek new challenges and a different kind of rhythm.

Transitioning into the very early days for modern project management, Mike discovered a career just as dynamic and challenging. Today, with decades of experience, he spearheads UCLA Health's Program Management, guiding his teams to excellence.

Mike's teams have achieved global acclaim, ranking 15th worldwide among top Project Groups, surpassing renowned names like Raytheon, Toyota, Capital One, and NASA. They even clinched the top spot in Collaboration, demonstrating a unique synergy and ability to deliver challenging projects.

Mike's foray into healthcare project management was unexpected and has been deeply personal. A sudden, bewildering, and life-altering hospital stay opened his eyes to the world of patient care, prompting him to seek ways to contribute. From an initial intent to volunteer, he became a pivotal player in healthcare project management, championing projects that matter deeply to patients, caregivers, and the communities healthcare organizations exist to serve.

In addition to leading teams, Mike has contributed to esteemed resources such as the Project Management Body of Knowledge (PMBOK) International Institute of Business Analysis (IIBA), he has authored educational content for prominent institutions worldwide, and has been published in numerous industry publications.

Mike's multifaceted journey, spanning music, management, and healthcare, showcases a dedication to excellence, innovation, and meaningful impact.

WHY PROJECT MANAGEMENT

Nurse Informaticists ensure evolving healthcare knowledge and practices are patient-centric, clinically relevant, designed to enhance the quality of care, and seamlessly integrate into clinical workflows, technology, and daily operations

Unique Role: Nurse Informaticists occupy a unique and vital position in healthcare project management. You serve as a crucial bridge between nursing practices, operations, healthcare technology, and project delivery

Dual Expertise: With dual expertise in nursing and informatics, you bring grounded realities of clinical practices to projects, making you indispensable members of any healthcare project

Nurse Informaticists sit at the *intersection* of **healthcare** and **technology**.

Your role is **pivotal** in implementing and optimizing technological solutions that revolutionize patient care.

Why Nurse Informaticists Care about Project Management?

- PATIENT-CENTRIC OUTCOMES
- STRUCTURED IMPLEMENTATION
- RISK MANAGEMENT
- RESOURCE OPTIMIZATION
- STAKEHOLDER COMMUNICATION

For Nurse Informaticists, project management is not just a set of tools or methodologies. ***It's a mindset*** *that, when adopted, significantly enhances the implementation and adoption of healthcare technologies,* ***ultimately driving better patient care****.*

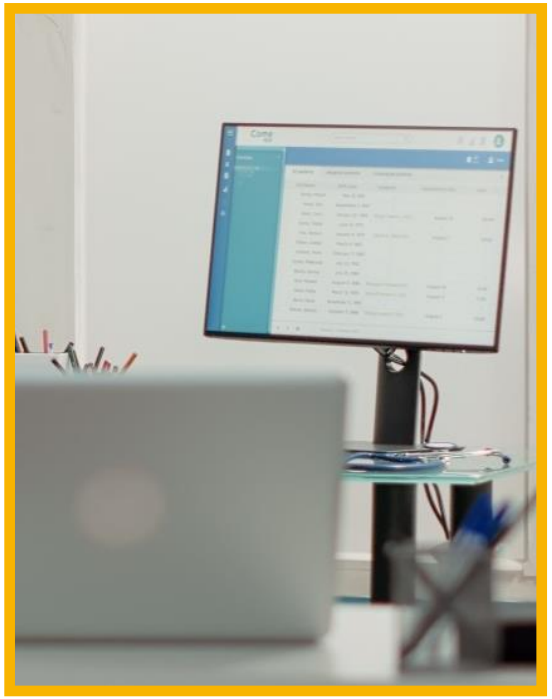
Why Nurse Informaticists Care about Project Management?

- CHANGE MANAGEMENT
- CONTINUOUS IMPROVEMENT
- PROFESSIONAL GROWTH
- HOLISTIC VIEW
- ENHANCED COLLABORATION

Why Nurse Informaticists Care About Project Management?

For Nurse Informaticists, project management is not just a set of tools or methodologies. It's a mindset that, when adopted, significantly enhances the implementation and adoption of healthcare technologies, ultimately driving better patient care.

- Patient-Centric Outcomes
- Change Management
- Structured Implementation
- Continuous Improvement
- Risk Management
- Professional Growth
- Resource Optimization
- Holistic View
- Stakeholder Communication
- Enhanced Collaboration



Nurse Informaticists sit at the intersection of healthcare and technology.

Your role is pivotal in implementing and optimizing technological solutions that revolutionize patient care.

PROJECT WORK **OR** OPERATIONAL

PROJECT	OPERATIONS
TEMPORARY: *Has an End*	**ON-GOING:** *No Scheduled end*
OUTPUT: *Unique*	**OUTPUT:** *Repetitive*
PURPOSE: Deliver objective, transition to Operation	**PURPOSE:** *Sustain the business*

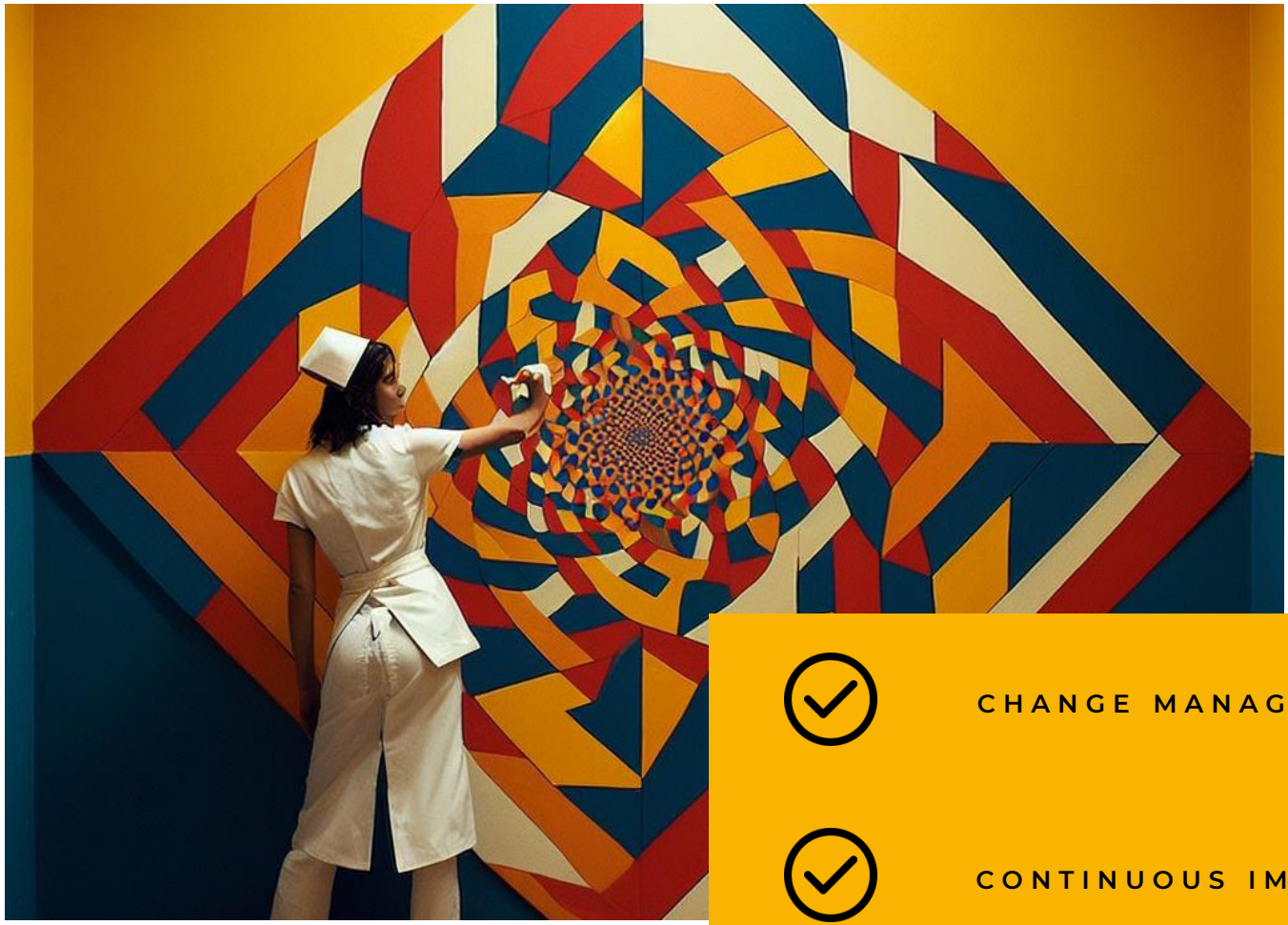
The Art & Science of Project Management

SCIENCE

METRICS
PROCESS
TEMPLATES

ART

INFLUENCE
CUSTOMER SERVICE
INTUITION



- CHANGE MANAGEMENT
- CONTINUOUS IMPROVEMENT

PROJECT MANAGEMENT 101

Basic principles that underpin the structured approach to managing projects enhance the quality of care.

- Stakeholder Engagement
- Define Clear Objectives
- Plan
- Organize Your Resources
- Lead your Project Team
- Execute
- Manage your Risks & Issues
- Documentation
- Monitor
- Communication
- Adaptability and Flexibility
- Closing / Transition to Support

YOUR PROJECT MANAGEMENT TOOLKIT

Know your basic project methodologies – WATERFALL & AGILE

Learn key PM tools such as WBS, Gantt Charts, Risk & Issue management, Stakeholder communications, Status

Soft Skills such as leadership, Communications, Problem Solving, Time Management

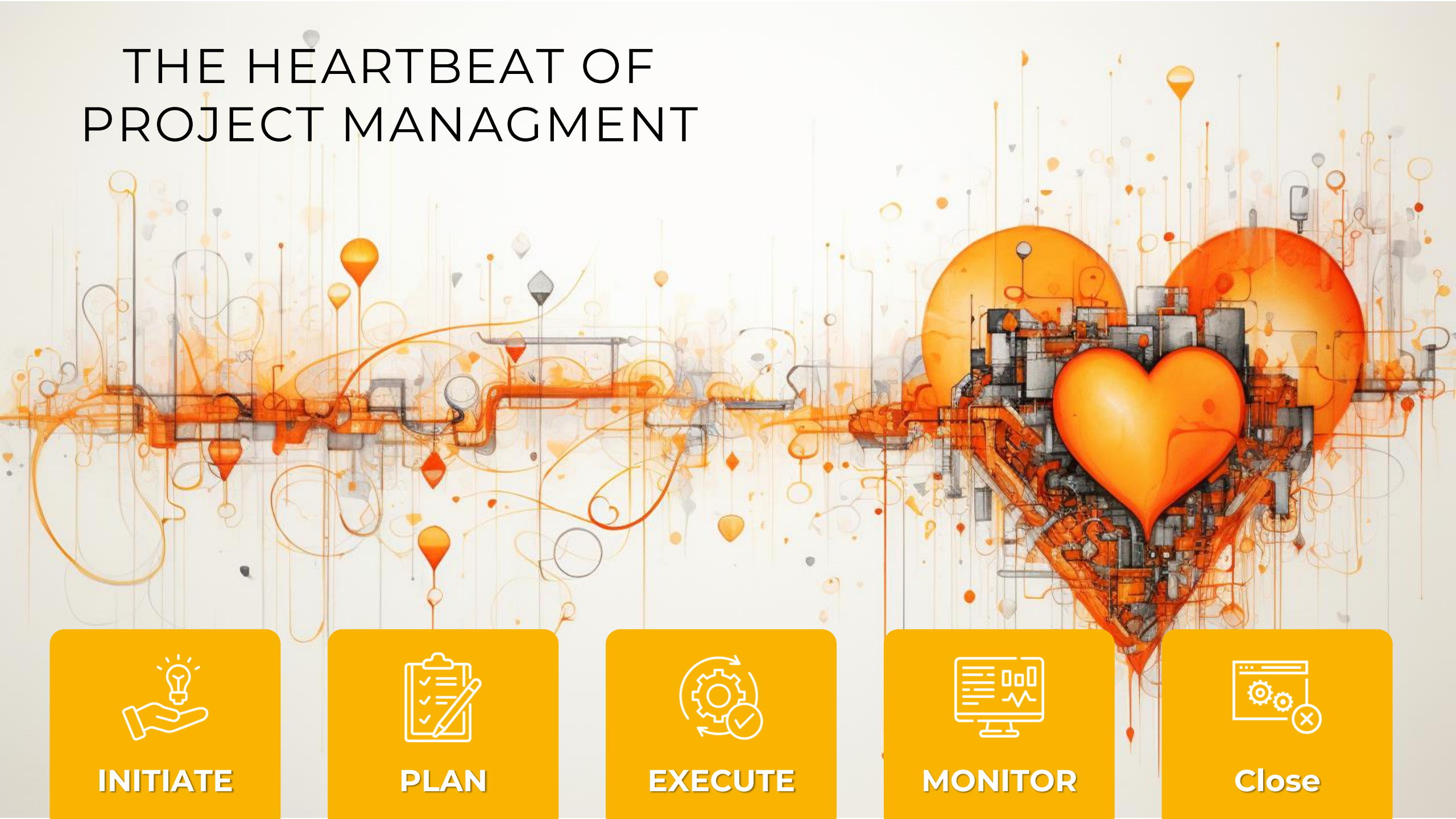
Change Management, Adoption, Quality Improvement (e.g. PDSA, Lean, Six Sigma, etc.)

Agile Project Management 101

Applying Agile principles means you can adapt and continuously improve information systems.

- Embrace Change
- Iterative Progress
- Collaboration Over Documentation
- User-Centered Design
- Cross-Functional Teams
- Regular Reflection
- Transparency
- Sustainable Work Pace
- Prioritize Work
- Empowerment and Trust
- Deliver Value Early and Often
- Quality Focus

THE HEARTBEAT OF PROJECT MANAGMENT



INITIATE

PLAN

EXECUTE

MONITOR

Close

Where Do You Fit In?

Nurse Informaticists are invaluable in ensuring health projects are patient-centric, clinically relevant, and designed to enhance the quality of care.

01. Interdisciplinary Collaboration

02. Stakeholder Representation

03. Requirement Gathering

04. Workflow Analysis

05. Training and Support

06. Quality & Patient Safety

07. Change Management

08. Testing and Validation

09. Project Evaluation

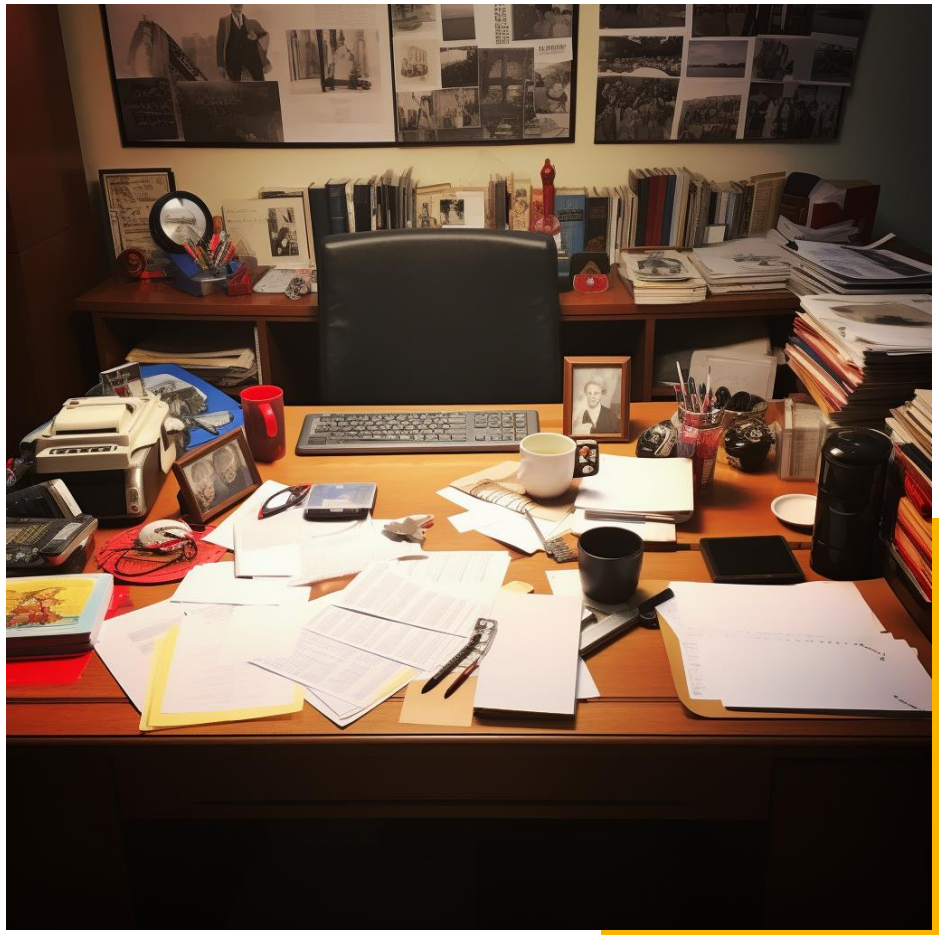
What's A Project Manager

The person responsible for leading a project from its inception to its close

Nurse Informaticists partners with Project Managers to meld technical execution with clinical insight. Together, they ensure projects are efficient and tailored to optimize patient care and staff workflows. the Project Manager oversees timelines, resources, and overall execution, while the Nurse Informaticist provides clinical workflows, user needs, and patient impacts

Project Managers ...

- Responsible for planning, execution, and management of the people, time, resources, & scope
- Create clear and attainable project objectives
- Primary contact for project issues or discrepancies
- Communicates project status, constraints, and risks & issues for organizational decision-making.
- Maintain progress, foster positive team dynamics, and create the conditions for success



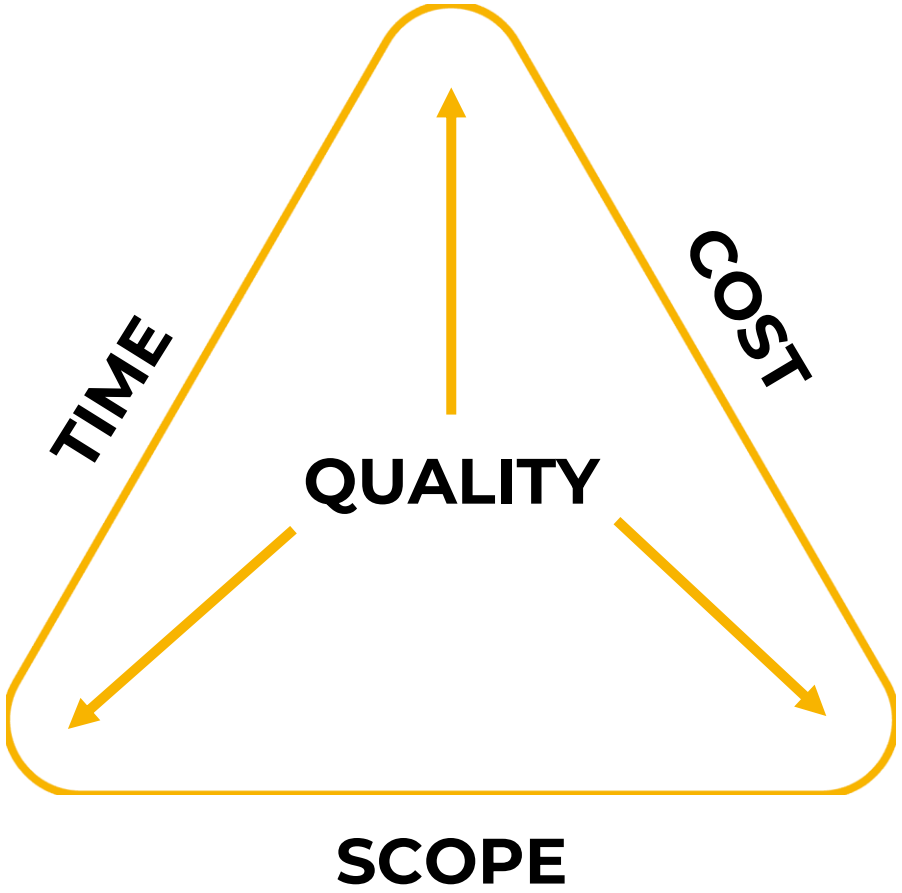
Project Management's Iron Triangle

Stewardship

At its core, the discipline of project management is concerned with the appropriate stewardship of limited resources

Balance

The objective is to maintain the right balance of the "Triple Constraints" (Time – Cost – Scope) to achieve quality project outcomes ("Iron Triangle")



Patient Care = Project Care

Just as a nurse monitors a patient's vitals, symptoms, and overall progress, a project manager monitors a project's timeline, resources, and overall progress.

	Patient Care	Project Care
Individualized Plans	Tailoring treatment plans to individual patient needs	Customizing project approaches to meet project goals
Monitoring	Regularly checking patient vitals & symptoms for change	Regularly tracking project progress & performance
Adaptive	Adjusting care plans as a patient's condition changes	Modifying project plans in response to project dynamics or risks & issues
Coordination	Collaborating across a multidisciplinary team for comprehensive care	Working with diverse stakeholders to ensure your project is aligned
Risk Management	Anticipating potential complications and taking steps to prevent them	Identifying risks early and developing mitigation strategies
Outcome-Focused	Aiming for the best possible health outcomes for the patient	Striving for your project to meet its objectives and deliver value
Resource	Managing limited healthcare resources effectively	Efficiently utilizing project resources to avoid waste
Documentation	Keeping detailed records of patient history and treatment	Maintaining comprehensive records of project activities and changes
Communication	Effective communication with patients and their families about care plans	Clear communication with project stakeholders regarding project status

ASK OPEN ENDED QUESTIONS

BE CURIOUS

- Spurs **innovative** solutions
- Encourages **learning** & **growth**
- Enhances *risk* anticipation
- Fosters adaptability to **change**
- Strengthens stakeholder relationships
- Drives pursuit of knowledge & efficiency
- **Ignites** team development and project innovation

What's Project Management?

Just as a nurse monitors a patient's vitals, symptoms, and overall progress, a project manager monitors a project's timeline, resources, and overall progress.

Define your project and its objectives

Outline how your project will be executed

Implement the plan and complete the work

Track, review, and report you project's progress

Finalize all activities and formally

WHAT HAVE WE DONE

- Traditional or Waterfall Methodologies: **~ 10**
- Agile Methodologies: **~ 40**
- Process-Based or Iterative Methodologies: **~ 10**
- Change-Driven or Adaptive Methodologies: **~ 10**
- Hybrid Methodologies (aka “Bimodal”): **~ 15**
- Standardized Approaches: **~ 15**

ESTIMATED TOTAL **: 100** PRIMARY PROJECT METHODOLOGIES

But, if you consider sub-variants, hybrids, and organization-specific, this number is nearer a **1,000**

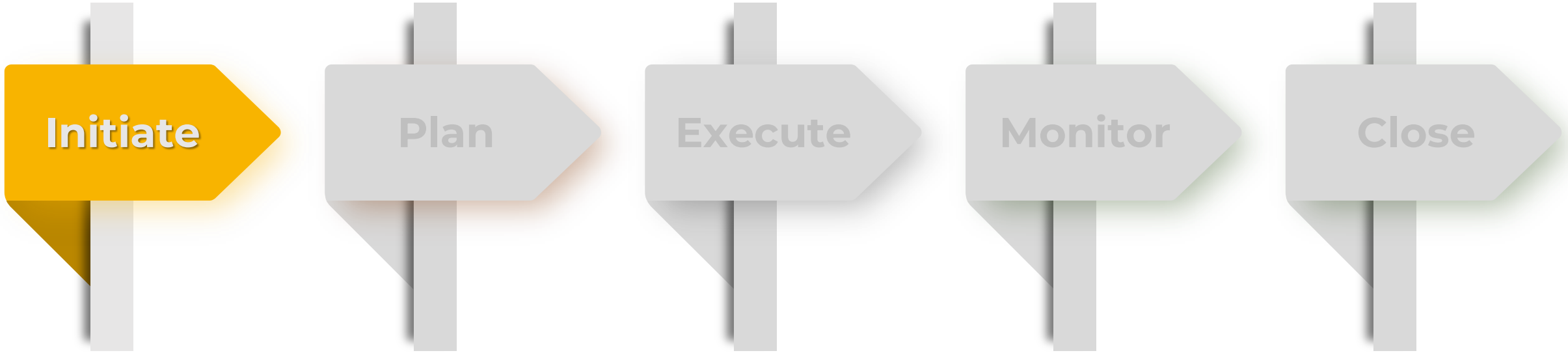
PROJECT MANAGEMENT INSTITUTE **(PMI)**

The Project Management Institute (**PMI**) delineates project management into different knowledge areas and processes. In PMI's A Guide to the Project Management

TOOLS & TECHNIQUES

PROCESSES

BREAK



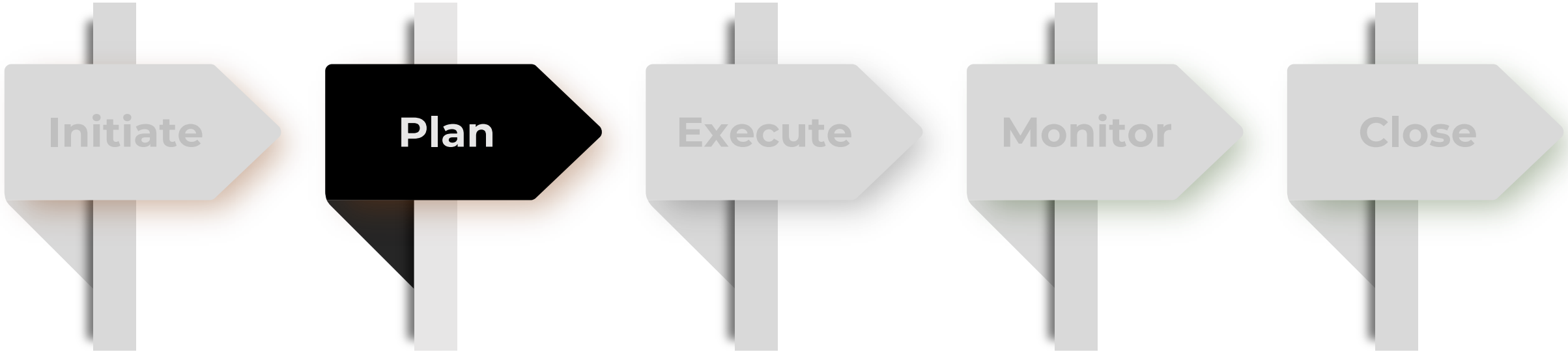
Traditional Initiate Activities

Intake:

- Business Case / Clinical Need
- Forecasting (Human and Financial Resources)
- Compliance
- Technical Risk Assessment (Can it be done, is it safe, & can we support it?)

Governance

Project Charter

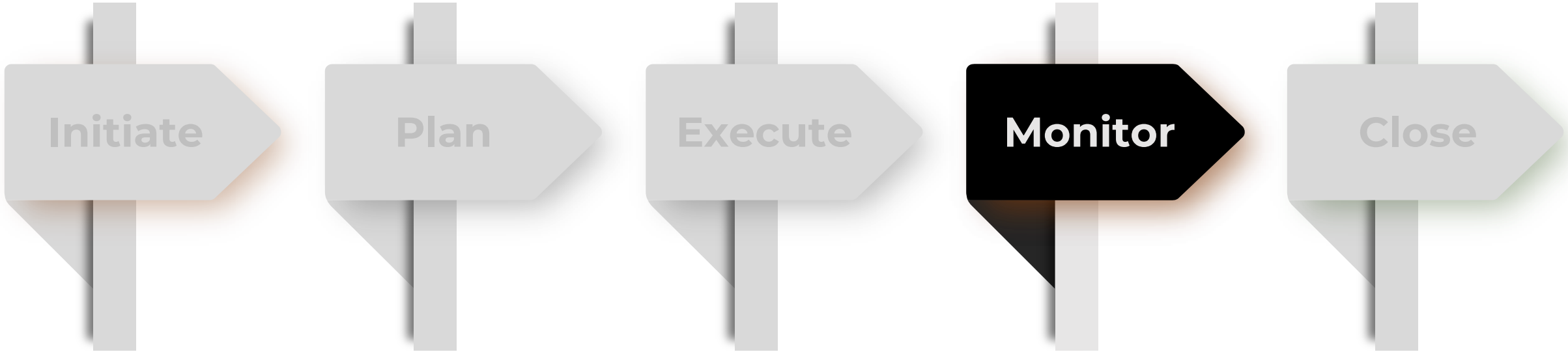


Traditional Plan Activities

01. Work Breakdown Structure (i.e. List of Tasks)	**02.** Resource Plan	**03.** Budget
04. Schedule	**05.** Scope	**06.** Baseline (Scope, Timeline, Budget)
07. Communication Plan	**08.** Stakeholder Matrix	**09.** Warranty Period Agreement

Traditional Execute Activities

- Configure / Build (i.e. Do the Work)
- Test
- Cutover Planning
- Transition to Support Planning
- Go-Live Communications
- Train



Traditional Monitor Activities

- Status Reports
- Risk & Issues
- Change Control
- Escalations
- Stakeholder Communications
- Project Resource Management

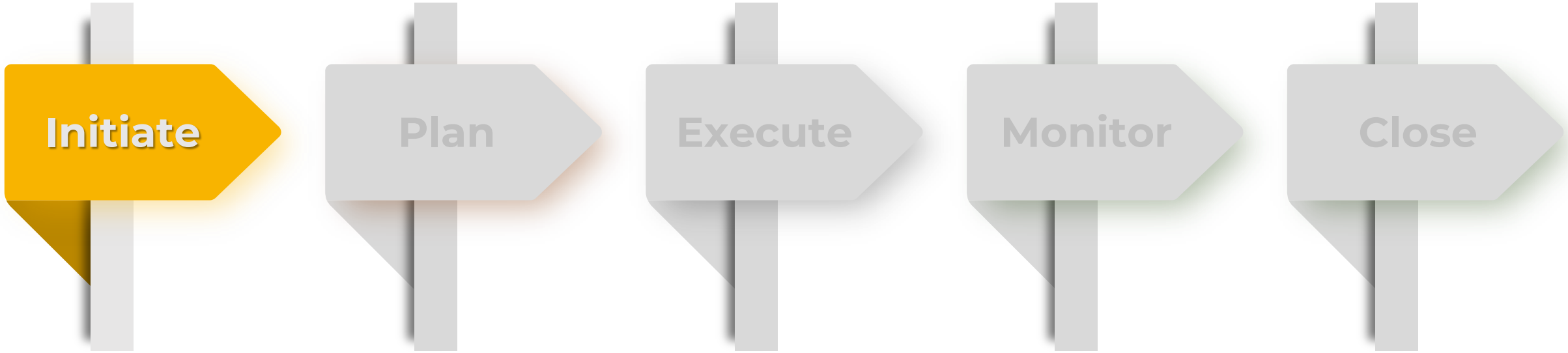
Traditional Close Activities

Transition
to Support

Warranty
Period

Lessons
Learned

Nurse Informatics Perspective

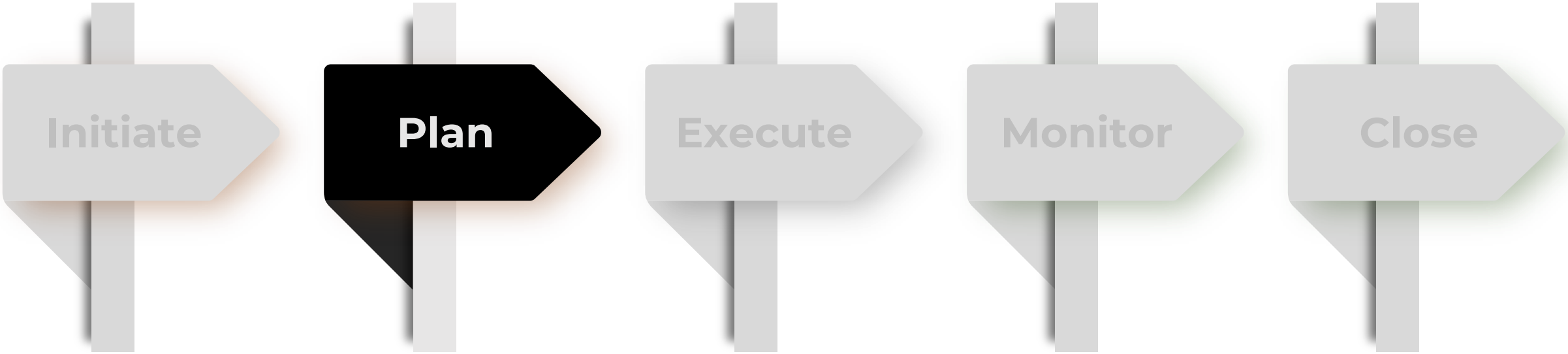


Nurse Informaticist - Initiate Activities

Needs Assessment: Nurse Informaticists interview clinical teams to understand current processes and challenges

Feasibility: Nurse Informaticists evaluate the feasibility of implementing the proposed solution

Nurse Informatics Perspective



Nurse Informaticist – Plan Activities

- **Scope Definition:** Functionalities & processes
- **Resource Allocation:** Support PMs budget development (e.g. training, additional staff, etc.)
- **Operational Risk Assessment**: Identify potential challenges (e.g. resistance to change, workflow or patient flow issues, etc. – Technical Risk done by PM)
- **Communication Plan:** Updates stakeholders (Nursing, IT, administration, vendor, etc.)
- **Training Plan:** Develop Nursing training approach

Nurse Informatics Perspective

Nurse Informaticist – Execute Activities

Vendor Selection: Assure RFPs / system selections, evaluations (POC, Pilots, etc.), include nursing's perspective & requirements

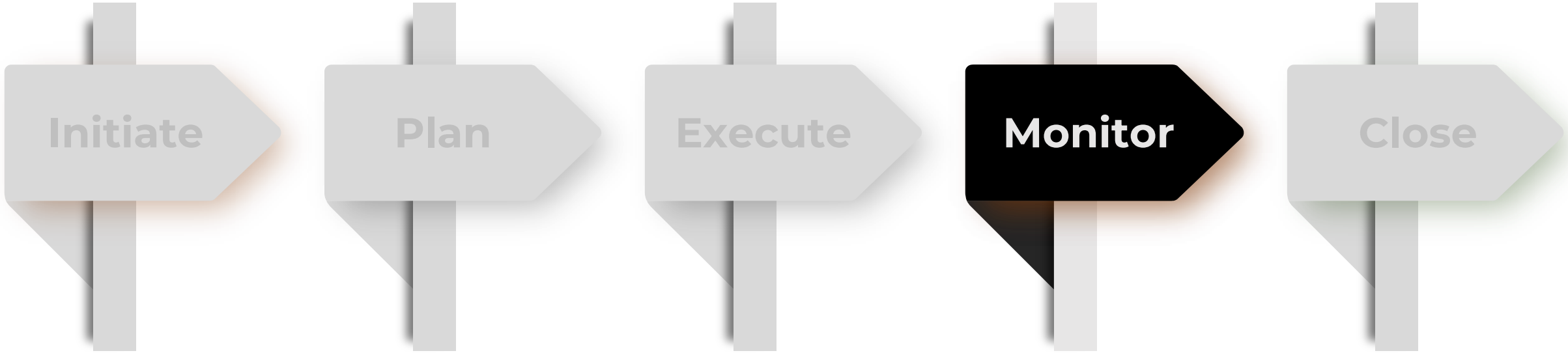
System Configurations & Customization: Work with vendor on configurations and customizations required to support nursing

Test Plans: Indemnify Testing Plans are comprehensive & appropriately cover Nursing workflows

Pilot Testing: Before a full-scale rollout, Pilot's are often leveraged - NI's lead collecting Pilot feedback

Training: Insure training covers nursing's needs. In some organizations, conduct training sessions

Nurse Informatics Perspective



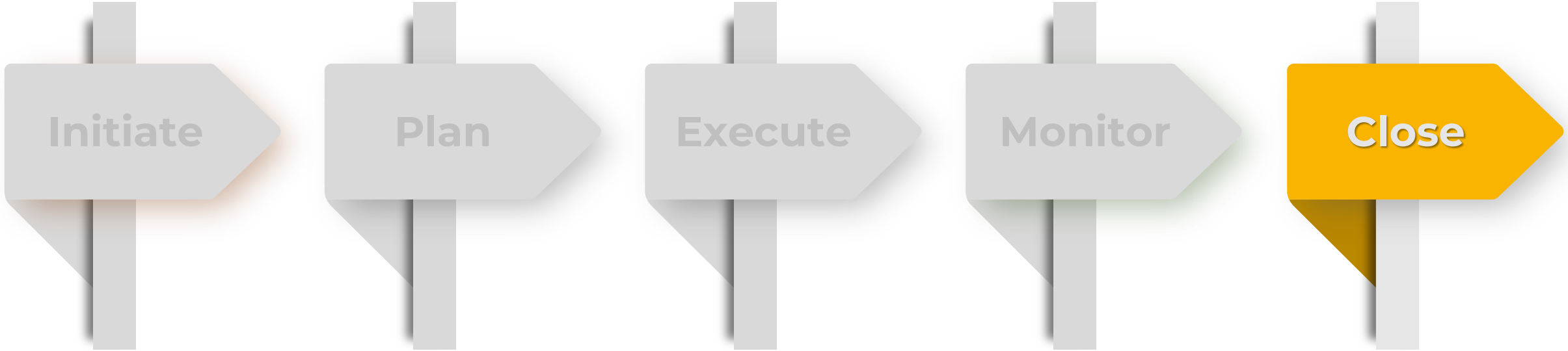
Nurse Informaticist – Monitor Activities

Quality Checks: Regular audits to ensure the solutions is being configured / developed correctly

Feedback Loop: Create feedback for nurses to report issues or suggest improvements

Performance Metrics: Develop and track performance metrics (e.g. errors, downtimes, adoption, patent impacts etc.)

Nurse Informatics Perspective



Nurse Informaticist – Close Activities

Evaluation: After a predetermined amount of time, evaluate the project's success

Documentation: Lessons learned, best practices, challenges, adoption issues, etc.

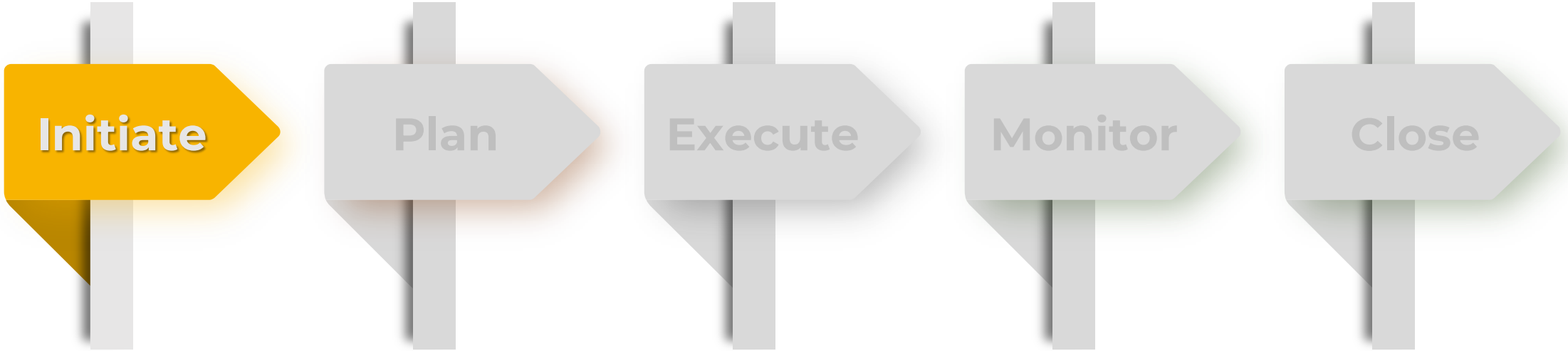
Stakeholder / Nursing Feedback: Conduct interviews or surveys to gather feedback from nursing & project stakeholders

Hypothetical Project:
“Lived Name”

Project Over-Arching Goals:

- Respect for Patient Identity
- Trust & Safety
- Improved Communications
- **Reduced Stress & Anxiety for Patients**
- Patient Empowerment
- Inclusivity
- Accuracy in Health Records
- **Better Health Outcomes**

“Lived Name”
Nurse Informatics



Nurse Informaticist – “Lived Name” Initiate

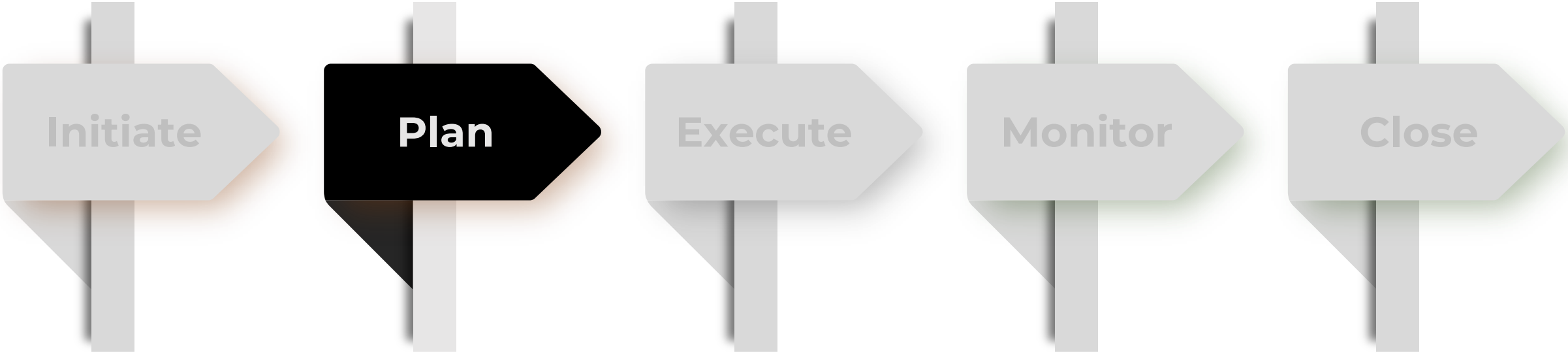
(Need Assessment) Identify the Need: Recognize the importance of capturing a patient's lived name to respect their identity & improve patient experience.

(Feasibility) Engage Stakeholders: Gather input from patients, healthcare providers, registration staff, IT, legal, Compliance, etc.

Develop Project Goals: Aim to create a more inclusive environment to enhance patient identification processes.

Develop a Project Statement: Outline the objectives, scope, and implications throughout a patient’s encounter

“Lived Name” Nurse Informatics



Nurse Informaticist – “Lived Name” Plan

Define Requirements: Understand requirements for capturing and using lived names in various systems, processes, and integrations

Detail Project Scope: Clearly delineate what changes will be made, where, and how they will integrate with existing systems

Resource Allocation: Determine resources needed for process changes, workflow changes, training, and communications

Risk Assessment: Identify potential risks, such as miscommunication of name changes or privacy concerns, and plan how to mitigate

Communication Plan: Establish how updates will be communicated

Operational Risk Assessment: Identify potential challenges (e.g. resistance to change, workflow or patient flow issues, etc.)

Training Plan: Develop Nursing training approach

“Lived Name” Nurse Informatics

Nurse Informaticist – “Lived Name” Execute

System Updates: Collaborate with IT / Vendor to update electronic systems for capturing lived names

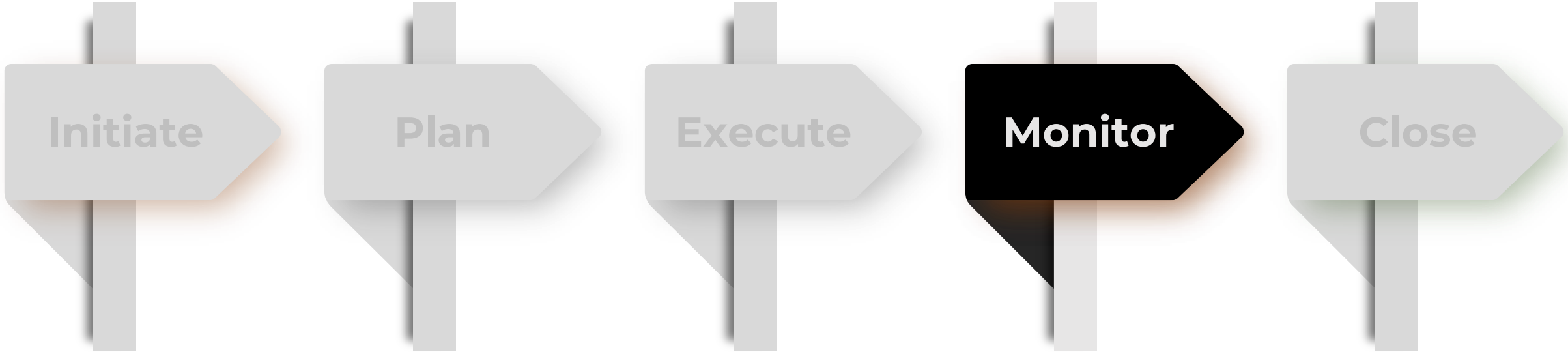
Policy Revisions: Work with Administration. Compliance, Legal, etc. to update patient identification policies and procedures

Training: Facilitate training material development for the new processes

Testing: Indemnify Testing Plans are comprehensive & appropriately cover Nursing workflows

Pilot: Implement the lived name recording process in a small, controlled setting to gather initial feedback and make necessary adjustments.

“Lived Name” Nurse Informatics



Nurse Informaticist – “Lived Name” Execute

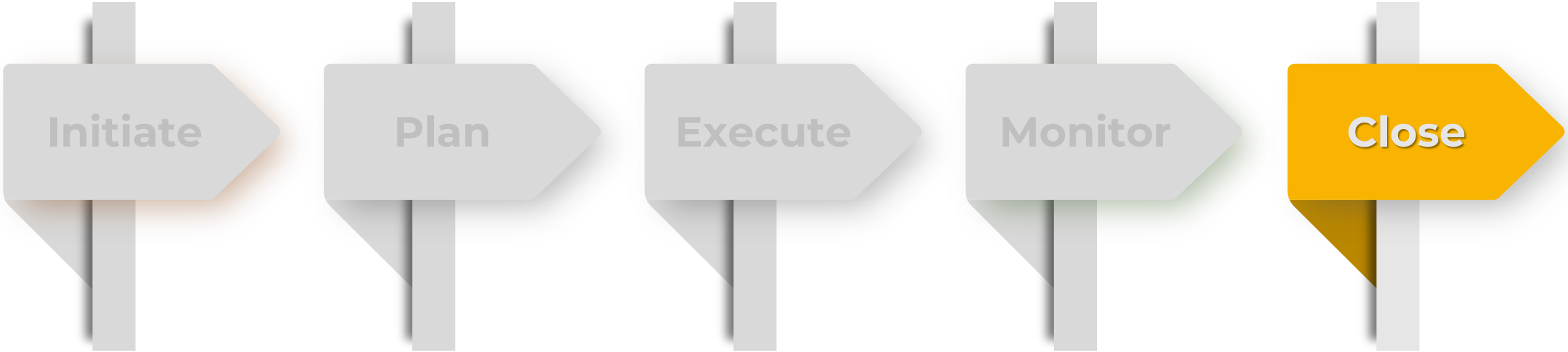
Track Progress: Monitor adoption

Stakeholder Feedback: Collect ongoing feedback from patients and staff to ensure the process is meeting its goals

Quality Checks: Regularly assess the correct usage of lived names in patient interactions and records

Manage Risks: Continuously watch for any issues that arise and implement strategies to address

“Lived Name” Nurse Informatics



Nurse Informaticist – “Lived Name” Close

Evaluate Success: Validate project goals were met, namely that lived names are accurately recorded and used.

Close-Out Report: Provide detailed report on project outcomes, including compliance rates and patient and staff satisfaction

Document Lessons: Record what worked well and what could be improved for similar future projects

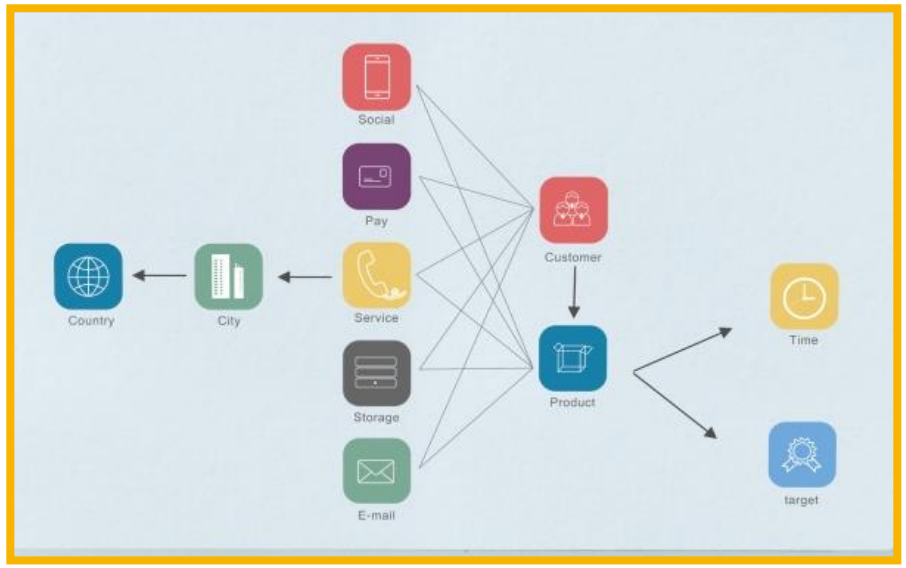
Official Transition: Ensure new processes are fully integrated into daily operations and ongoing support is adequate

“Lived Name”
Nursing Informatics Summary

Nurse Informaticists plays crucial roles in ensuring that all aspects of the process change are considered. They bridge the gap between patients, patient care, regulators, Legal, and the information systems that are required

Examples: Tools & Techniques For Nurse Informaticists

- Flowcharting and Process Mapping: Visualize current and future processes
- Change Management Strategies: Resistance, Adoption, Training, etc.
- Stakeholder Analysis: Identify key players (Champions and Detractors) to tailor communications
- Feedback Mechanisms: Tools like surveys, feedback forms, focus group discussions, etc
- Data Analytics: Measure your project
- Project Management Software: Track tasks, deadlines, resources, responsibilities, progress, etc.
- Simulation & Scenario Training: Leverage virtual environments to train & educate



Frequently Used Vocabulary Of Project Management

01.

Stakeholders
Individuals or groups with an interest in the project's outcome

02.

Scope
Boundaries of the project

03.

Milestones
Significant points or events in the project timeline

04.

Risks & Issues
Events or issues that could negatively affect the project

05.

Resources
Assets allocated to a project including software, hardware, data, & human

06.

Deliverables
Tangible outcomes or products to be delivered by the project

07.

Timeline
Schedule

08.

Critical Path
Tasks that cannot be delayed without affecting the project's overall timeline

09.

Objectives
Measurable goals

10.

Change Management
Manage changes to a project ensuring minimal disruption

11.

Governance
The framework of policies and procedures that guide project decision-making

12.

User Acceptance Testing ("UAT")
End-users test new systems or features to ensure they meet needs

13.

Implementation Plan
A detailed guide on how to execute the project

Frequently Uses Vocabulary of Agile Project Management

01.

Embrace Change
Agile is built on the premise that change is expected and welcomed

02.

Iterative Process
Projects are broken down into manageable efforts known as iterations or sprints

03.

Collaboration over Documentation
While documentation is important, Agile emphasizes collaboration

04.

User-Centric Design
Focus on the end-user—patients, nurses, or healthcare staff—and their experience

05.

Cross Functional Teams
Agile teams are cross-functional, meaning they have all skills necessary to deliver

06.

Regular Reflection
At the end of an iteration the team reflects on what worked well and what didn't

07.

Transparent Communication
Daily (sometimes twice per day) stand-up meetings support team communications

08.

Sustainable Work Pace
Agile encourages teams to work at a pace that can be sustained long-term

09.

Prioritize Work
Using a backlog, tasks are prioritized based on value

10.

Empowerment and Trust
Teams are self-organizing and empowered to make decisions

11.

Deliver Value Early and Often
Aim to deliver working enhancements or improvements frequently

12.

Quality Focus
Agile doesn't compromise on quality

Risk, Issue, Change
Know the Difference

Risk

Situation that has not yet had an impact on scope schedule Budget and or Quality.

Mitigatable

issue

situation that has affected Scope Schedule Budget and or Quality

Escalation and intervention

Change

Solution to issue has been accounted for in the project plan and approved

Payment change to plan

When Projects Flourish, Patients Benefit

01. Enhanced Care Quality

02. Increased Efficiency

03. Better Data Management

04. Advanced Health Outcomes

05. Patient Safety

06. Staff Empowerment

07. Cost-Effectiveness

08. Compliance and Standards

09. Patient Engagement

10. Scalability for Future Needs

11. Feedback Integration

Empower Your Informatics Journey
With Project Management

- Harness the full potential of healthcare technology
- Translate informatics expertise into successful projects
- Elevate patient care through strategic projects
- Lead change with confidence & structured approaches
- Cultivate cross-functional collaboration
- Drive continuous improvement
- Become a catalyst for innovation in healthcare

Next in Project Management

1. Confluence / Knowledgeable is searchable & in-depth
2. Office Hours and Regularly Scheduled Training help users get “Unstuck”
3. The Agile TBD Podcast was created to creatively explore learning Rally and Agile
4. Apty is a digital adoption platform we are rolling out that will provide on-screen guidance to Users

Get Started TODAY with UPlan

Check out the Modern UX Knowledgebase HERE

Announcement

Is someone in your team going to take PTO soon?

If you are a resource manager with folks going on vacation, check out our update

- Update PTO Hours in UPlan

PMO Processes

- Project Management Process
- Project Naming Convention
- NPR Process
- NPR Meeting Checklist
- CRM Process
- Project Change Request Process
- Project States
- Project Size

Tipsheets by Role

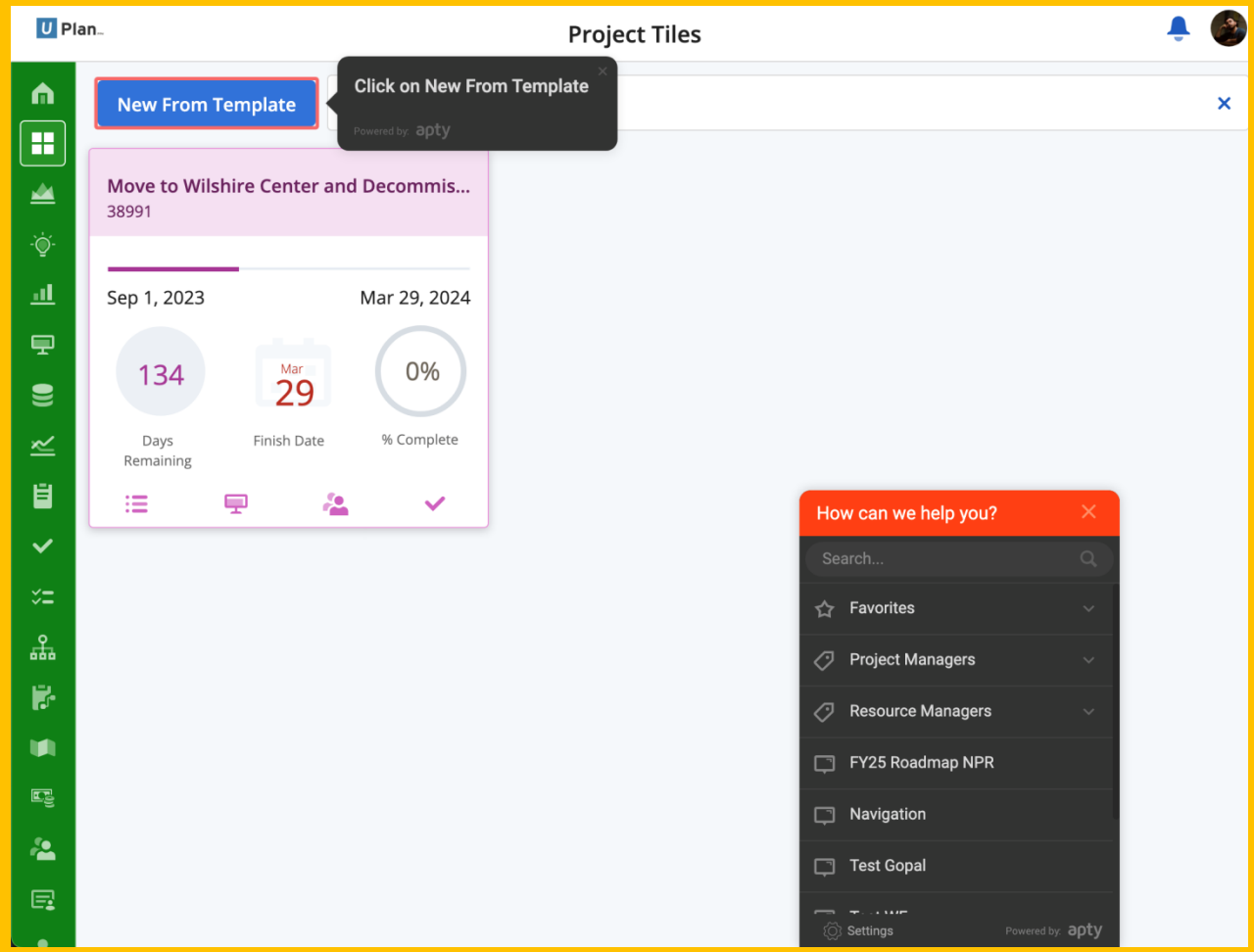
- Team Members
- Customer Relationship Manager
- Project Manager
- Resource Manager
- Program Manager
- PMO

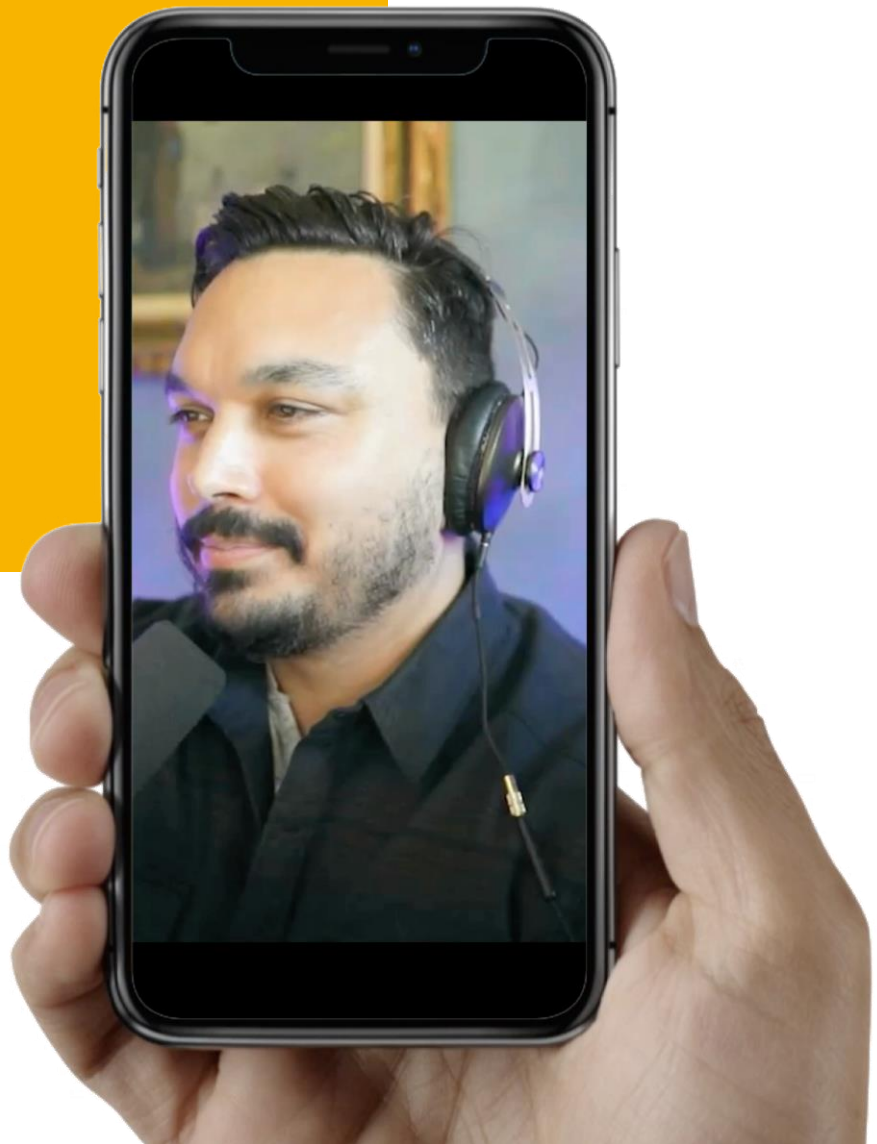
Next in Project Management

APTY

This new **digital adoption** platform sits on top of UPlan to help guide users in-context to accomplish tasks and allow us as Product Managers to monitor where our users are struggling

APTY



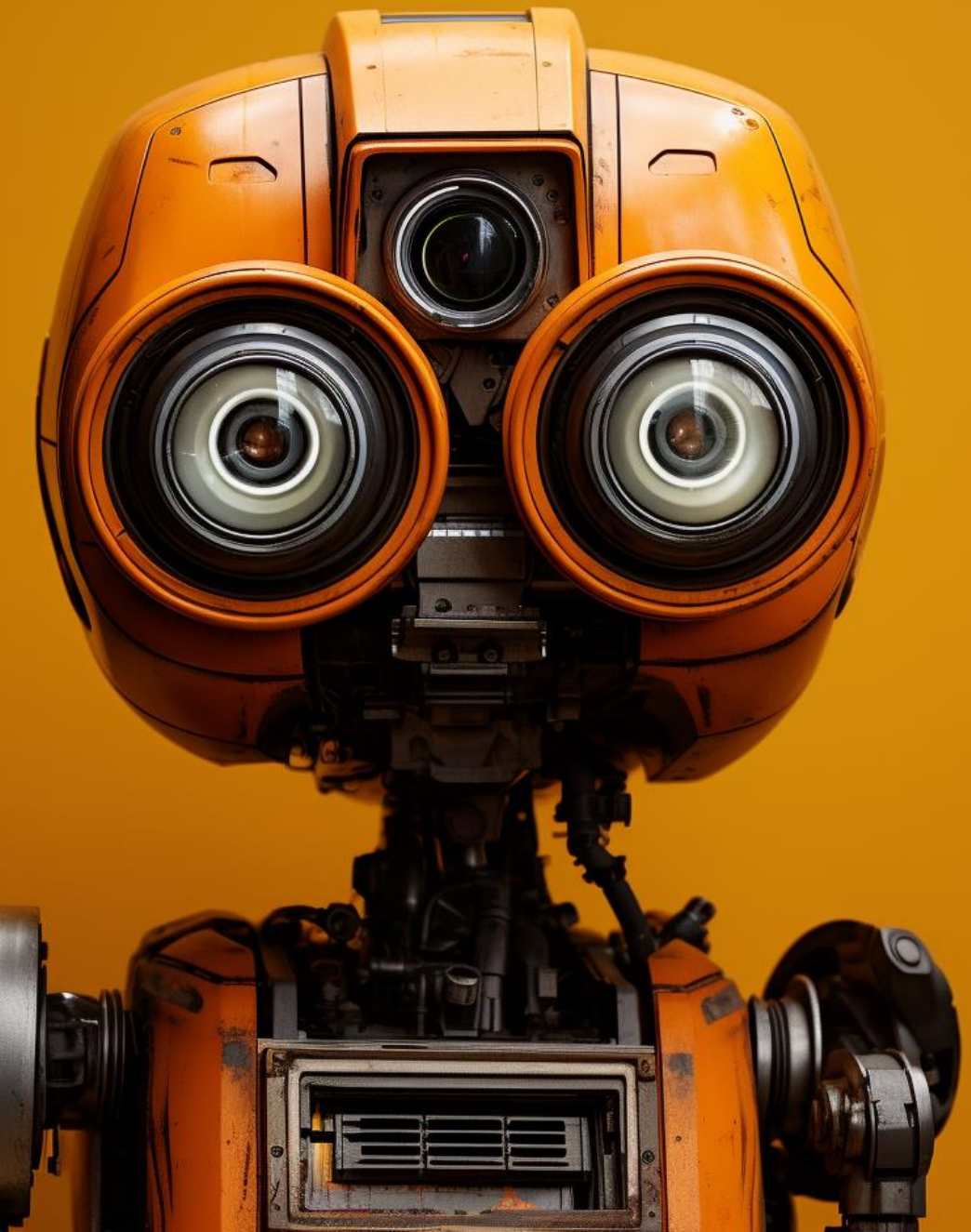


AGILE TBD PODCAST

We took a new approach to training and education with the podcast. Mixing on-screen guided training with focused discussions about Agile and Product

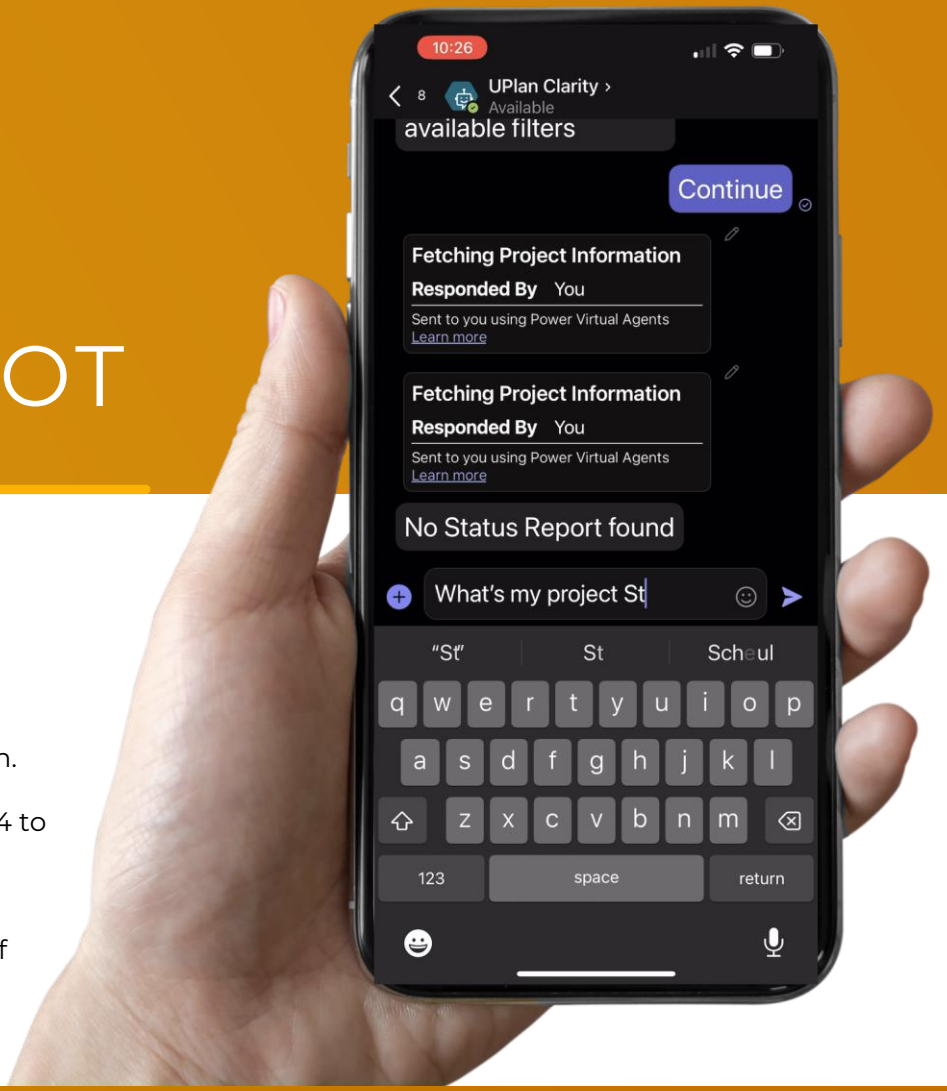
06 EPISODES

308 MINUTES



AI CHATBOT

Using **Microsoft Teams** & **Microsoft Flow** we are able to query basic project information. We plan to integrate ChatGPT4 to allow Executives to get automated-narrative reports of their portfolio.



Empower Your Informatics Journey with Project Management

Harness the full potential of healthcare technology → Translate informatics expertise into successful projects → Elevate patient care through strategic projects

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Lead change with confidence & structured approaches → Cultivate cross-functional collaboration → Drive continuous improvement

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Become a catalyst for innovation in healthcare

THANK YOU

PRESENTED BY MIKE ROACH